

CHRIS User Guide: Completing a Mid-Year Appraisal

CHRIS Responsibility Required: Manager Self-Service

Module Overview

Purpose

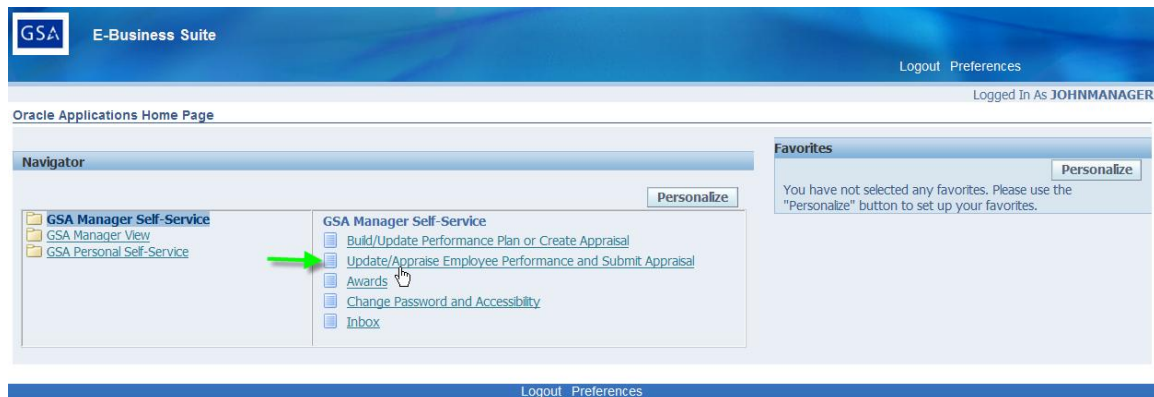
As part of the automation of the APPAS policy, supervisors can manage performance evaluations and appraisals through CHRIS Self-service. This automation includes issuing performance plans, and conducting mid-year/interim/annual appraisals. Once the mid-year appraisal has been created in Build Performance Plan, the manager/main appraiser will need to complete the mid-year in the Appraisals section of APPAS. This guide offers instructions for completing the mid-year appraisal.

Chapter Contents

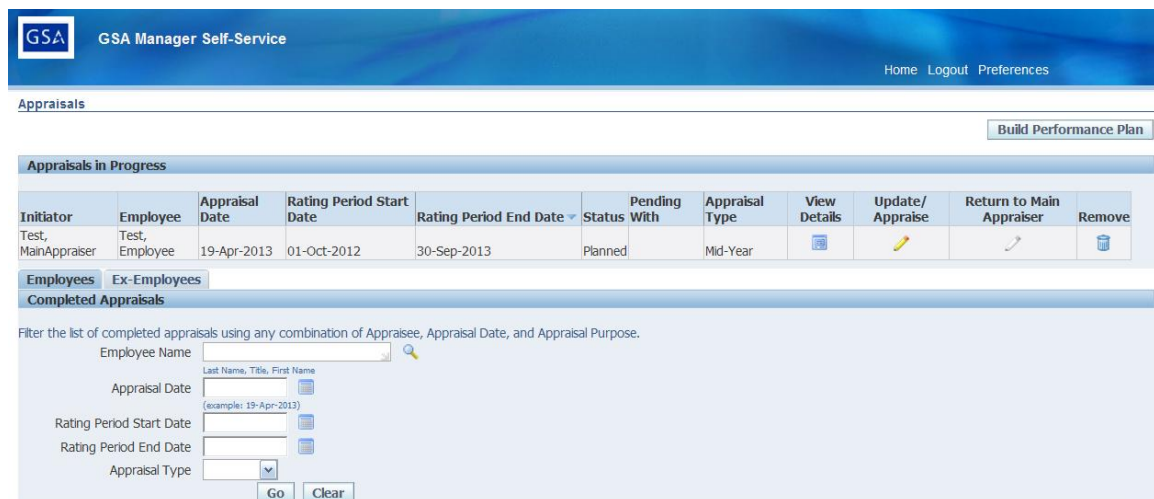
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Locating the Appraisal


After logging in to CHRIS, click on the **GSA Manager Self-Service** responsibility, then select the **Update/Appraise Employee Performance and Submit Appraisal** menu option.

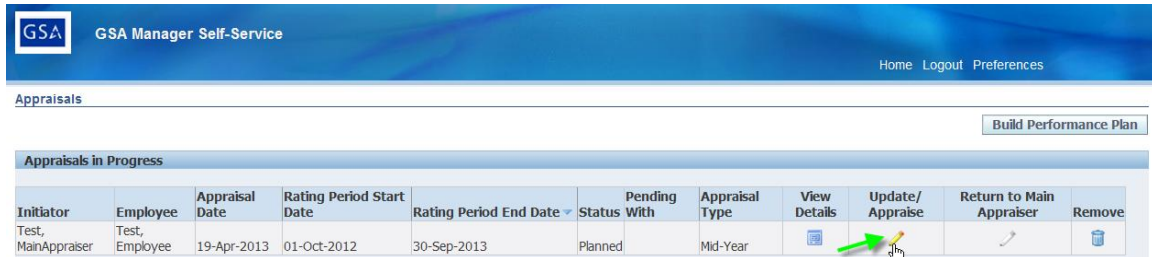


This will take you to the **Appraisals** screen, which is separated into two sections: **Appraisals in Progress** and **Completed Appraisals**. **Appraisals in Progress** gives you a list of Appraisals that you created in **Build Performance Plan**. These are the appraisals we will be working with, in this user guide.



Completing the Appraisal

To begin the process of completing the appraisal, select the **Update/Appraise** icon , in the row of the respective employee.







GSA Manager Self-Service


Home Logout Preferences

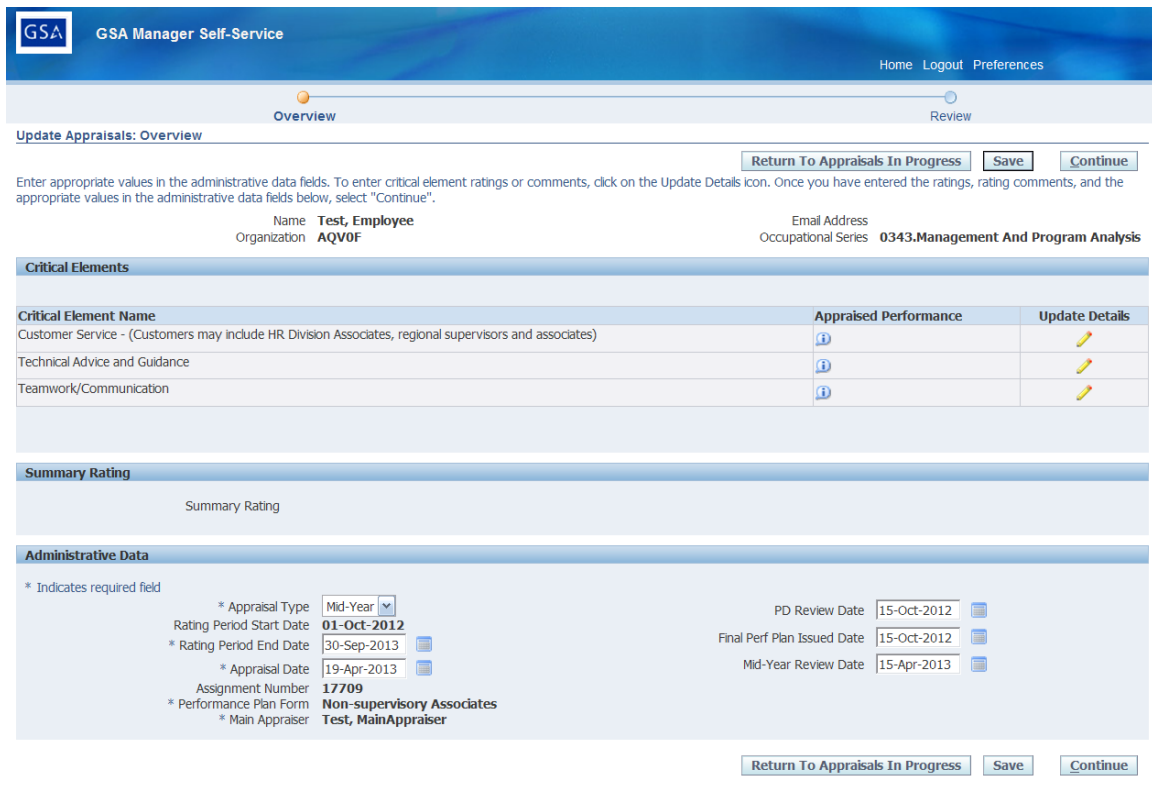
Appraisals

Build Performance Plan

Appraisals in Progress

Initiator	Employee	Appraisal Date	Rating Period Start Date	Rating Period End Date	Status With	Appraisal Type	View Details	Update/Appraise	Return to Main Appraiser	Remove
Test, MainAppraiser	Test, Employee	19-Apr-2013	01-Oct-2012	30-Sep-2013	Planned	Mid-Year				

The **Update Appraisals: Overview** screen allows the user to modify the **Appraisal Type**, **Rating Period End Date**, **Appraisal Date**, **PD Review Date**, **Final Performance Plan Issued Date**, and **Mid-Year Review Date**. Once these dates are confirmed as accurate, select the **Save** button. Next, begin the rating process by selecting the **Update Details** icon , in the row of the 1st critical element.



GSA Manager Self-Service

Home Logout Preferences







Overview Review

Update Appraisals: Overview

Return To Appraisals In Progress Save Continue

Enter appropriate values in the administrative data fields. To enter critical element ratings or comments, click on the Update Details icon. Once you have entered the ratings, rating comments, and the appropriate values in the administrative data fields below, select "Continue".

Name **Test, Employee** Email Address
Organization **AQV0F** Occupational Series **0343.Management And Program Analysis**

Critical Element Name	Appraised Performance	Update Details
Customer Service - (Customers may include HR Division Associates, regional supervisors and associates)		
Technical Advice and Guidance		
Teamwork/Communication		

Summary Rating

Summary Rating

Administrative Data

* Indicates required field

* Appraisal Type **Mid-Year**

Rating Period Start Date **01-Oct-2012**

* Rating Period End Date **30-Sep-2013**

* Appraisal Date **19-Apr-2013**

Assignment Number **17709**

* Performance Plan Form **Non-supervisory Associates**

* Main Appraiser **Test, MainAppraiser**

PD Review Date **15-Oct-2012**

Final Perf Plan Issued Date **15-Oct-2012**

Mid-Year Review Date **15-Apr-2013**

Return To Appraisals In Progress Save Continue

You can select a rating level (rating level is required only for AFGE employees), and include your comments for the employee's performance, in regard to the critical element. You may type these comments directly into the field, or copy and paste them from a Word document. Once this is complete, select the **Save and Update Next** button, to rate the next critical element.

Important: The **Appraiser Comments** field will accept the first 2,000 characters. All characters beyond 2,000 will not appear in the Appraisal form.

The screenshot shows the 'Update Critical Elements' page in the GSA Manager Self-Service system. The page has a blue header with the GSA logo and 'GSA Manager Self-Service' text. Navigation links for 'Home', 'Logout', and 'Preferences' are in the top right. Below the header, there's a progress bar with 'Overview' and 'Review' tabs. The main content area is titled 'Update Critical Elements' and includes instructions: 'Enter the level rating and comments for this critical element, then continue to the next critical element by selecting "Save and Update Next". Once you arrive to the last critical element, the "Save and Update Next" button will no longer appear. Select the "Save" button to continue.' Below this, the 'Critical Element' is 'Customer Service - (Customers may include HR Division Associates, regional supervisors and associates)', 'Start Date' is '01-Oct-2012', and 'Percentage' is '34'. The 'Rate On This Critical Element' section contains a dropdown for 'Appraised Performance' with a list of levels (1-Level 1 to 5-Level 5), a text area for 'Appraiser Comments', and a 'Specific Details Measure' section with a 'Show' button. At the bottom right of the form are 'Back', 'Save and Update Next', and 'Save' buttons.

Continue the process of selecting a rating, typing in comments, and clicking the **Save and Update Next** button, until you reach the last critical element. Once you reach the last critical element, select the **Save** button, after including your rating and comments.

The screenshot shows the 'Update Critical Elements' page in the GSA Manager Self-Service system for the 'Teamwork/Communication' critical element. The layout is identical to the previous screenshot, with the 'Critical Element' field now showing 'Teamwork/Communication' and the 'Percentage' field showing '33'. The 'Rate On This Critical Element' section includes the same rating dropdown, comment text area, and 'Specific Details Measure' section. The bottom right of the form shows 'Back' and 'Save' buttons, indicating that the 'Save and Update Next' button is no longer present as this is the final critical element.

Now that a rating has been issued for all of the critical elements, you have the opportunity to review the ratings that you have issued, as well as make any last changes to the appraisal dates. Once confirmed as accurate, select the **Continue** button.

GSA Manager Self-Service

Home Logout Preferences

Update Appraisals: Overview

Return To Appraisals In Progress Save **Continue**

Enter appropriate values in the administrative data fields. To enter critical element ratings or comments, click on the Update Details icon. Once you have entered the ratings, rating comments, and the appropriate values in the administrative data fields below, select "Continue".

Name **Test, Employee** Email Address
Organization **AQV0F** Occupational Series **0343.Management And Program Analysis**

Critical Element Name	Appraised Performance	Update Details
Customer Service - (Customers may include HR Division Associates, regional supervisors and associates)	3-Level 3	
Technical Advice and Guidance	3-Level 3	
Teamwork/Communication	3-Level 3	

Summary Rating **3-Level 3**

Administrative Data

* Indicates required field

* Appraisal Type **Mid-Year** PD Review Date **15-Oct-2012**
 Rating Period Start Date **01-Oct-2012** Final Perf Plan Issued Date **15-Oct-2012**
 * Rating Period End Date **30-Sep-2013** Mid-Year Review Date **15-Apr-2013**
 * Appraisal Date **19-Apr-2013**
 Assignment Number **17709**
 * Performance Plan Form **Non-supervisory Associates**
 * Main Appraiser **Test, MainAppraiser**

Return To Appraisals In Progress Save **Continue**

The **Update Appraisals: Review** screen allows you to review the appraisal data, in a non-editable format. If you must make any revisions, select the **Back** button. Otherwise, select the **Continue** button.

GSA Manager Self-Service

Home Logout Preferences

Update Appraisals: Review

Cancel Preview **Continue** Back

Please review the dates and ratings that you have entered, seen below. If changes must be made, select the "Back" button. If no changes are required, move forward by selecting the "Continue" button.

Name **Test, Employee** Email Address
Organization **AQV0F** Occupational Series **0343.Management And Program Analysis**

Administrative Data

Initiator **Test, MainAppraiser** Main Appraiser **Test, MainAppraiser**
 Appraisal Type **Mid-Year** Appraisal Date **19-Apr-2013**
 Rating Period Start Date **01-Oct-2012** Final Perf Plan Issued Date **15-Oct-2012**
 Rating Period End Date **30-Sep-2013** Mid-Year Review Date **15-Apr-2013**
 Performance Plan Form **Non-supervisory Associates**


Critical Elements [Return to Top](#)

[Show All Details](#) | [Hide All Details](#)

Critical Element Name	Appraised Performance
Customer Service - (Customers may include HR Division Associates, regional supervisors and associates)	3-Level 3
Technical Advice and Guidance	3-Level 3
Teamwork/Communication	3-Level 3

Cancel Preview **Continue** Back

If you must change the main appraiser for the appraisal, select the **Change Main Appraiser** button. Otherwise, select the **Summary Ratings and Comments** button.

 **GSA Manager Self-Service**

Home Logout Preferences

Confirmation

Your changes have been saved.

Main Appraiser Review

Return To Appraisals In Progress

Edit Appraisal Data

Summary Ratings and Comments

Select the "Summary Ratings and Comments" button to move forward. This page allows you another opportunity to review, and change the main appraiser, if applicable.

Name

Test, Employee

Email Address

Organization

AQV0F

Occupational Series

0343.Management And Program Analysis

Administrative Data

Initiator

Test, MainAppraiser

Appraisal Date

19-Apr-2013

Appraisal Type

Mid-Year

PD Review Date

15-Oct-2012

Rating Period Start Date

01-Oct-2012

Final Perf Plan Issued Date

15-Oct-2012

Rating Period End Date

30-Sep-2013

Mid-Year Review Date

15-Apr-2013

Performance Plan Form

Non-supervisory Associates

Main Appraiser

Test, MainAppraiser

Change Main Appraiser

Critical Elements

Show All Details | Hide All Details

Details	Critical Element Name	Appraised Performance
Show	Customer Service - (Customers may include HR Division Associates, regional supervisors and associates)	3-Level 3
Show	Technical Advice and Guidance	3-Level 3
Show	Teamwork/Communication	3-Level 3

Return To Appraisals In Progress

Return To Appraisals In Progress

Edit Appraisal Data

Summary Ratings and Comments

Home Logout Preferences

The **Summary Ratings and Comments** screen allows you to include your **Summary Rating Overall Comments**, and **Development and Training Comments**. You may type these comments directly into the field, or copy and paste them from a Word document. If you would like to attach any files that will be stored in CHRIS with the completed mid-year, please select the appropriate **Add Attachment** button. Once completed, select the **Save and Continue** button.

Important Note: The **Summary Rating Overall Comments** and **Development and Training Comments** fields will each accept up to 2,000 characters. All characters beyond 2,000 will not appear in the Appraisal form. Use of the attachment functionality will allow you to document comments that go beyond the 2,000 character limitation in the field. Attachments made on the **Summary Ratings and Comments** screen will be stored with the completed appraisal in CHRIS.

Summary Ratings and Comments

Note that the calculated summary rating for the appraisal is below. Include your overall comments, and your development and training comments. Once this is complete, select the "Save and Continue" button to move forward.

Back Edit Appraisal Save Save and Continue

Name: Test, Employee
Organization: AQWV

Email Address: Occupational Series: 0343:Management And Program Analysis

Critical Elements

Show All Details Hide All Details
Details: Critical Element Theme
Show Customer Service - (Customers may include HR Division Associates, regional supervisors and associates)
Show Technical Advice and Guidance
Show Teamwork/Communication

Summary Rating and Comments

Summary Rating: 3-Level 3
Overall Comments

Attachments: Summary Rating and Comments

Add Attachment

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

Development and Training

Comments

Attachments: Development and Training

Add Attachment

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

Back Edit Appraisal Save Save and Continue

Submitting the Appraisal

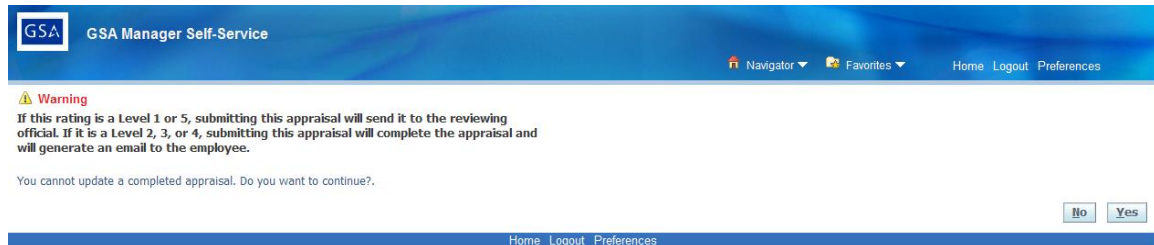
You are now viewing the **Final Review** screen. If you have not met with the employee, do not submit the appraisal. Rather, generate a PDF of the appraisal by selecting the **Printable Form** button, which you can share with the employee. Once the meeting has taken place and you are ready to submit, return back to this screen. A 2nd level of approval is not required for mid-year appraisals, so the mid-year will not require approval regardless of the summary rating. However, if you would like to select an approver you have the ability to do so on this screen. You may use the **Comments to Approvers** field to share a message with the approver, and the attachment functionality to attach a file.

Note: Comments to the approver and/or any attached files you provide to the approver on this screen will not stay with the appraisal. They are exclusively for the approver and will not be stored with the completed appraisal in CHRIS. They are used only in the approval process as a means to include additional support to the 2nd level approver.

Once the appraisal is confirmed as accurate, select the **Submit** button.

The screenshot shows the 'Final Review' screen in the eSA Manager Self-Service system. The header includes the eSA logo and navigation links for Home, Logout, and Performance. The main content area is divided into several sections: 'Critical Elements' with links to 'Show All Details' and 'Hide All Details', and a table for 'Details: Critical Element Name' with rows for 'Customer Service', 'Technical Advice and Guidance', and 'Teamwork/Communication'. Below this is the 'Summary Rating and Comments' section, showing a 'Summary Rating' of '3-Level 3' and a field for 'Overall Comments'. The 'Development and Training' section has a 'Comments' field. The 'Reviewing Officials' section includes a table with columns for 'Name', 'Reviewing Official', 'Category', and 'Delete', and a link to 'Add Reviewing Official'. The 'Comments to Approvers' section has a text area for comments. The 'Additional Information' section has an 'Attachments' field with a link to 'Add'.

The **Warning** screen appears, notifying you that a level 1 or 5 will be submitted to a 2nd level approver, and a level 2, 3, or 4 will generate an email to the employee. As mentioned in this guide, a 2nd level of approval is not required for a summary rating level 1 or 5 mid-year. Disregard the warning in the case of the mid-year, and if you are ready to submit the appraisal, select **Yes**.



The confirmation message appears, confirming that the appraisal has been completed.

To continue completing appraisals, look for the next appraisal under **Appraisals in Progress**. If the appraisal has not been created, select the **Build Performance Plan** button to view performance plans and create additional appraisals.

